

## How to Review a Request to Purchase

## Step-by-Step Instructions for Reviewing a Request to Purchase

After a Request to Purchase (RTP) has been submitted, it is automatically routed for Agency Approval (as needed), Requisite Procurement Program review (as needed) and subsequent DAS review.

- ▲ **Agency Approver:** To approve as an Agency Approver refer to steps 1-3.
- ▲ **Requisite Review:** To approve as a Requisite Approver refer to steps 4-6.
- ▲ **DAS Review:** To approve as a DAS Procurement Manager, refer to steps 7-10.
- ▲ **Complete Sourcing Event:** To approve after conducting the associated solicitation for an RTP, refer to steps 11-13.

**Agency Approver:**

To view all items pending approval, log in to OhioBuys. Under **My Pending Validations**, click the object hyperlink next to the request that has an **Activity** of "Agency Approver".

My Pending Validations <span>+150 Results</span>				
Workflow	Activity	Object	Due date	History
Request to Purchase	Agency Approver	<a href="#">RTP0000000112 - 6,060,000 4 mil nitrile gloves</a>		

Review the details of the RTP. Make any updates as needed.

Request to Purchase

Header

ID

112

Status

Agency Approver

Requested Date

4/28/2021

Label \*

6,060,000 4 mil nitrile gloves

☐ Priority one waiver granted

Request Type

Request for Sourcing

Type of Purchase

Medical

Commodity \*

42132203 - Medical exam or non surgical procedure gloves

Description of Request \*

The purchase of 60,600 4 mil nitrile gloves (box of 100). Total of 6,060,000 gloves. Quantities to be delivered: 6,060 bxs small, 24,240 bxs medium, 24,240 bxs large and 6,060 bxs of large.

Is there an existing DAS contract for similar items/services? \*

No

Date on which you will need this purchase? \*

6/25/2021

Estimated Amount \*

1,145,340,000

Supporting Attachments

Click or Drag to add files

Supplier

WB MASON CO INC

Additional Potential Suppliers

Manager Recommendation

Source Information

Organization \*

DMH-OH DEPT OF MH & ADDICTION SVCS

Requester

PRICE Alex

Business Unit

DMH01 - OH Dept of MH & Addiction Svcs

Contact Person \*

Alex Price

Contact Phone Number

Contact Email

Is this a one time need or ongoing? \*

One Time

Is this an MBE set-aside Purchase?

On Hold

☐

Is this on the MBE set-aside Plan?

Agency Approval

Agency Approver

Bradley Ari

Disposition

Resolution

☐ State Printing to Source

## Step-by-Step Instructions for Reviewing a Request to Purchase (Agency Approver)

▲ If you would like to add any comments and/or attachments to the RTP, navigate to the **Workflow** tab and use the **Add a comment** section to add comments and send a notification to the desired user. To do this, enter comments in the **Comment** field, select the desired user from the **Send to** drop-down menu, and then click **Save**.

3

If the request is valid, click **Approve**. If the request is not a valid request, click **Reject**. You will be required to enter comments whenever a request is rejected. These comments will then be emailed to the user who submitted the request.

**Requisite Review:**

To view all items pending approval, log in to OhioBuys. Under **My Pending Validations**, click the object hyperlink next to the request that has an **Activity** of "Requisite Review".

4

My pending validations <span>7 Results</span>				
Workflow	Activity	Object	Due date	History
Sourcing Request R3	Requisite Review	<a href="#">SOL0000000085 - ALB RTP Requisite</a>		
Sourcing Request R3	Requisite Review	<a href="#">SOL0000000082 - dogs</a>		
Standard Requisition Workflow	Requisite Program Approval	<a href="#">REQ0000003888 - Reg. 8/21/2020 (ADJ112040 Scholarship Program BEAR - Requisitioner SIT)</a>		

## Step-by-Step Instructions for Reviewing a Request to Purchase (Requisite)

Review the details of the request. If a Requisite Procurement Program can fulfill the submitting user's request, the user is required to make the purchase from that Requisite Procurement Program regardless of the purchase amount.

- ▲ If you would like to add any comments and/or attachments to the Request to Purchase, navigate to the **Workflow** tab and use the **Add a comment** section to add comments and send a notification to the desired user. To do this, enter comments in the **Comment** field, select the desired user from the **Send to** drop-down menu, and then click **Save**.

If the request for a Requisite Program waiver is justified, select the **Waiver Granted** button.

**Waiver Granted**

A pop up will appear confirming that you will not be providing the goods requested. Click **Ok**.

If your organization will provide the goods/services in question, select the **Waiver Denied** button.

**Waiver Denied**

- ▲ For State Printing requests where State Printing will be responsible for the solicitation, the **State Printing to Source** slider must be engaged prior to clicking **Waiver Denied**.  
 ▲ This slider is only editable by Printing Procurement Managers.

## Step-by-Step Instructions for Reviewing a Request to Purchase (DAS Review)

- a) After a RTP has been reviewed by the Requisite Procurement Program approver, it will be routed back to the Requester for review if the waiver was denied.

## Requisite Program Decision

Priority	Requisite Supplier	Commodities Provided by Requisite	Decision Date	Decision Made?	Decision Made?	Requisite Decision
1	DAS STATE PRINTING	Masking tape	10/9/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Waiver Denied
1 Result(s)						

- b) After a RTP has been reviewed by the Requisite Procurement Program approver, it will be routed for DAS review if the waiver was granted.

## DAS Review:

To view all items pending approval, log in to OhioBuys. Under **My Pending Validations**, click the object hyperlink next to the request that requires your review.

## My pending validations

52 Results

Workflow	Activity	Object	Due date	History
Sourcing Request R3	Cancel	<a href="#">SOL0000000084 - ALB Test</a>		
Sourcing Request R3	DAS Review	<a href="#">SOL0000000084 - ALB Test</a>		
Sourcing Request R3	Cancel	<a href="#">SOL0000000083 - astlgasdf</a>		
Sourcing Request R3	Cancel	<a href="#">SOL0000000082 - dogs</a>		

Review the details of the Request to Purchase. Make updates as needed.

Save Cancel Reject Approve

Request to Purchase

Header

ID: 91

Status: In Progress

Requested Date: 3/4/2021

Label: 6,060,000 4 mil nitrile gloves

Priority one waiver granted: ☐

Request Type: Request for Sourcing

Type of Purchase: Medical

Commodity: 42132203 - Medical exam or non surgical procedure gloves

Description of Request: The purchase of 60,600 4 mil nitrile gloves (box of 100). Total of 6,060,000 gloves. Quantities to be delivered: 6,060 bxs small, 24,240 bxs medium, 24,240 bxs large and 6,060 bxs of xlarge. 60,600 x \$18.90/unit = \$1,145,340.00 Delivery by 4/23/21.

Is there an existing DAS contract for similar items/services?: No

Date on which you will need this purchase?: 4/23/2021

Estimated Amount: 1,145,340.00

Supporting Attachments: WB\_Mason\_Gloves\_1145340\_APR\_BAM\_signed.pdf

Supplier: WB MASON CO INC

Release and Permit:

Source Information

Organization: DMH-OH DEPT OF MH & ADDICTION SVCS

Requester: PRICE Alex

Business Unit: DMH01 - OH Dept of MH & Addiction Svcs

Contact Person: John Atwood

Contact Phone Number: 303-908-3456

Contact Email: john@test.com

Is this a one time need or ongoing?: One Time

Is this an MBE set-aside Purchase?:

On Hold: ☐

Is this on the MBE set-aside Plan?:

Manager Recommendation

Manager Recommendation:

Disposition

Resolution:

State Printing to Source: ☐

4

### Step-by-Step Instructions for Reviewing a Request to Purchase (DAS Review)

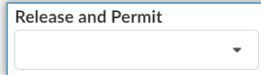
Based on your assessment of the RTP, complete the **Manager Recommendation** and **Resolution** fields:

<p><b>Manager Recommendation</b></p> <p>Manager Recommendation</p> <p><input type="text"/></p>	<p><b>Disposition</b></p> <p>Resolution</p> <p><input type="text"/> <input type="checkbox"/> State Printing to Source</p>
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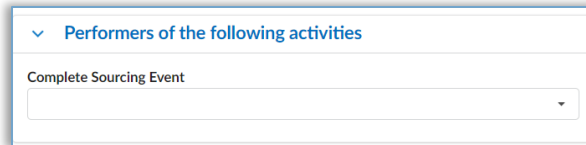
Option	Description	Resulting Workflow Step
DAS to Solicit	Selected when a DAS Contract Analyst will run a solicitation on the behalf of an agency with the goal of completing either an Enterprise Contract, an Agency Specific Contract, a State Printing purchase, a Multi-Agency Contract, or a One Time Purchase for a RTP.	Complete Sourcing Event
DAS to negotiate contract	Selected when a DAS Contract Analyst will negotiate a contract on behalf of the agency.	Complete Sourcing Event
Released for OAKS payment processes only	Selected when a RTP should be released for OAKS payment processing.	R&P Auto Assign
OAKS R&P Only (DPA Exceeded)	Selected when a purchase would cause the agency to exceed their direct purchase authority (DPA) with a supplier and an OAKS R&P needs to be created.	R&P Auto Assign
Cancel Request to Purchase	Selected when a RTP should be cancelled either due to error or if submitted when not required. When this option is selected, comments should be added to the Workflow tab of the RTP. Please note, this resolution option should be used instead of the Cancel button.	Cancel
Non-IT Release and Permit	Selected when a non-IT R&P should be created for the RTP.	R&P Auto Assign
Agency to utilize Direct Purchase Authority	Selected when an agency should use their DPA. When this option is selected, the RTP will move to the Complete step and the object creator should be assigned the request.	Complete
Add to existing Contract	Selected when a DAS Contract Analyst will add to an existing contract to accommodate an agency's RTP.	Complete Sourcing Event
Complete – see comments on Workflow tab	Selected when a RTP will not result in a solicitation, contract, and/or R&P. When this option is selected, comments should be added to the Workflow tab of the RTP.	Complete
IT Agency Released Solicitation	Selected when an IT solicitation should be completed by the agency who submitted the RTP.	Complete Sourcing Event

## Step-by-Step Instructions for Reviewing a Request to Purchase (DAS Review)

- ▲ If an existing IT Release & Permit (R&P) should be associated with the RTP, select the corresponding IT R&P on the **Release and Permit** field. Users will only be able to select R&Ps that are valid and match both the listed agency and Supplier on the RTP.

A screenshot of a dropdown menu labeled "Release and Permit" with a downward arrow on the right side.

Navigate to the **Workflow** tab and enter and select the name of the user that will be responsible for completing the RTP in the **Complete Sourcing Event** field.

A screenshot of a form section titled "Performers of the following activities" with a dropdown menu labeled "Complete Sourcing Event".

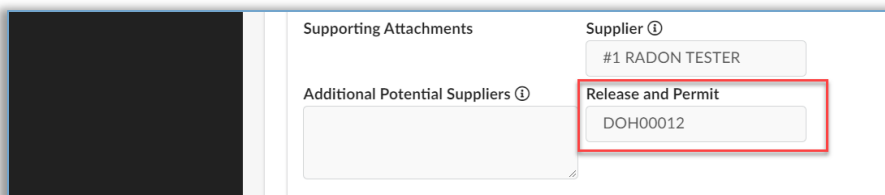
- ▲ Only users with the Contract Analyst or Procurement Manager profile will be available for selection.
- ▲ A user must be selected here even if the RTP will not result in a solicitation/contract. If this is the case, please select your own name on the **Complete Sourcing Event** field. If the submitting agency is going to use their DPA to complete the request, select the creator of the RTP on the **Complete Sourcing Event** field.

If you would like to add any comments and/or attachments to the Request to Purchase, navigate to the **Workflow** tab and use the **Add a comment** section to add comments and send a notification to the desired user. To do this, enter comments in the **Comment** field, select the desired user from the **Send to** drop-down menu, and then click **Save**.

Click **Approve**.

A green rectangular button with the word "Approve" in white text.

- ▲ Approvers can also reject by clicking **Reject**. Users will be required to enter a reason for the rejection.
- ▲ Approvers can also cancel the RTP by clicking **Cancel**. Users will be required to enter a reason for the cancellation. This will cancel the RTP and move it to a "Deleted" status.
- ▲ When action is taken at the DAS Review step of the workflow, the associated creator of the RTP is notified via email of the corresponding Resolution.
- ▲ When a non-IT R&P is automatically assigned as part of the RTP workflow, the R&P that is generated will have an end date that is equal to the last day of the fiscal year referenced on the RTP. For example, if the RTP lists a fiscal year of 2023, the resulting R&P will have an end date of 6/30/2023. The corresponding R&P number will be visible on the Release & Permit field of the RTP.

A screenshot of a form with three sections: "Supporting Attachments", "Additional Potential Suppliers", and "Supplier". The "Supplier" section shows "#1 RADON TESTER" and a "Release and Permit" field with the value "DOH00012" highlighted by a red box.

## Step-by-Step Instructions for Reviewing a Request to Purchase (Sourcing Event)

**Complete Sourcing Event:**

After a RTP has been assigned to an analyst, the assigned analyst will receive an email notification and pending validation.

To view all items pending approval, log in to OhioBuys. Under **My Pending Validations**, click the object hyperlink next to the request that requires your review.

12

My Pending Validations <span>+150 Results</span>				
Workflow	Activity	Object	Due date	History
Request to Purchase	Complete Sourcing Event	<a href="#">RTP0000000132 - ek test 1</a>		
Questionnaire	Manager Recommendation	<a href="#">Determination &amp; Recommendation</a>		
Request to Purchase	DAS Review	<a href="#">RTP0000000127 - ek test 5</a>		
Request to	DAS Review	<a href="#">RTP0000000124 - ek test of 6,060,000 4</a>		

Review the details of the Request to Purchase.

13

Create Request To Purchase

Save Forward Reject Complete Cancel

Request to Purchase

Requisition Program

Workflow

ID: 91

Status: Assigned

Requested Date: 3/4/2021

Label: 6,060,000 4 mil nitrile gloves

Request Type: Request for Sourcing

Type of Purchase: Medical

Commodity: 42132203 - Medical exam or non surgical procedure gloves

Description of Request: The purchase of 60,600 4 mil nitrile gloves (box of 100). Total of 6,060,000 gloves. Quantities to be delivered: 6,060 bxs small, 24,240 bxs medium, 24,240 bxs large and 6,060 bxs of xlarge

Is there an existing DAS contract for similar items/services? No

Date on which you will need this purchase? 4/23/2021

Estimated Amount: 1,145,340.000

Supporting Attachments: WB\_Mason\_Gloves\_1145340\_APR\_BAM\_signed.pdf

Supplier: WB MASON CO INC

Additional Potential Suppliers

Release and Permit

Source Information

Organization: DMH-OH DEPT OF MH & ADDICTION SVCS

Requester: PRICE Alex

Business Unit: DMH01 - OH Dept of MH & Addiction Svcs

Contact Person: John Atwood

Contact Phone Number: 303-908-3456

Contact Email: john@test.com

Is this a one time need or ongoing? One Time

Is this an MBE set-aside Purchase?

On Hold

Is this on the MBE set-aside Plan?

Agency Approval

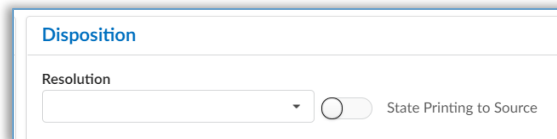
Agency Approver

## Step-by-Step Instructions for Reviewing a Request to Purchase (Sourcing Event)

14

▲ If you are unable to complete the RTP and believe it was routed to the incorrect user, click the **Forward** button at the top of the page to forward the request to an additional user. Any Contract Analyst within your agency can be forwarded a RTP.

After completing the associated sourcing project and/or contract, make any necessary updates to the **Resolution** field (e.g., DAS to solicit – Enterprise Contract, Non-IT Release and Permit, Complete – see Comments on Workflow tab, etc.).



The screenshot shows a form titled "Disposition". It contains a "Resolution" label above a dropdown menu. To the right of the dropdown is a toggle switch labeled "State Printing to Source".

13

Click **Complete**.



A green rectangular button with the word "Complete" in white text.

The assigned user can also reject by clicking **Reject**. Users will be required to enter a reason for the rejection.



A red rectangular button with the word "Reject" in white text.